DOCUMENT RESUME

ED 460 261 CE 077 500

TITLE	Productivity Training Project Final Report.
INSTITUTION	University of Southern Colorado, Pueblo.
SPONS AGENCY	Office of Vocational and Adult Education (ED), Washington, DC. National Workplace Literacy Program.
PUB DATE	1997-09-25
NOTE	34p.; The Productivity Training Project represents a partnership between the University of Southern Colorado and the Latino Chamber of Commerce of Pueblo, Colorado.
AVAILABLE FROM	Latino Chamber of Commerce of Pueblo, 215 S. Victoria Ave., Pueblo, CO 81003. Tel: 719-542-5513; Fax: 719-542-4657.
PUB TYPE	Reports - Descriptive (141)
EDRS PRICE	MF01/PC02 Plus Postage.
DESCRIPTORS	Adult Basic Education; *Basic Skills; Inplant Programs; *Job Skills; *Job Training; Literacy Education; Models; Needs Assessment; Partnerships in Education; Program Development; Program Effectiveness; Program Evaluation; Skill Development; *Small Businesses; Underemployment; Unemployment; *Workplace Literacy
IDENTIFIERS	Colorado (Pueblo); *Latinos

ABSTRACT

This report describes the Productivity Training Project (PTP), a partnership between the University of Southern Colorado and Latino Chamber of Commerce (LCC) of Pueblo. The project provided "new economy skills" training to employees of LCC member businesses and basic skills training to the unemployed or underemployed. The report explains how PTP made progress in achieving most of its nine objectives: (1) it refined processes through which partnerships were established; (2) LCC's Corporate Advisory Council served as the Partners Council to oversee the project; (3) PTP customized programs of instruction to meet content and time requirements of a very wide variety of businesses; (4) PTP adopted a consultative approach to uncover workplace issues upon which to provide training; (5) it did not conduct job-task analyses; (6) it delivered new economy skills instruction to 552 employees; (7) it served 762 individuals, 513 of whom achieved measurable gains in academic proficiency in one module of instruction or other training related goals; (8) it provided customized training for 45 LCC member businesses; and (9) PTP produced a final report. An evaluation of PTP based on interviews with 17 stakeholders categorizes seven themes that address project effectiveness into three groups: workplace education in the community (community and cultural context, business/education needs, barriers to providing workplace education), program strengths (instructor expertise, impact of training), and program challenges (marketing, past/future). (YLB)

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ED 460 261

PRODUCTIVITY TRAINING PROJECT

LATINO CHAMBER OF COMMERCE

UNIVERSITY OF SOUTHERN COLORADO

FINAL REPORT

September 25, 1997

CE 077500

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PRODUCTIVITY TRAINING PROJECT

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MEMORANDUM

September 25, 1997

To: Irene Diaz, Mary Gershwin, Sandy Gutierrez, Dr. Bart Ward, Dr. Kevin Duncan, Cindy Graham, James Parker, Dr. Les Wong, Alfonso Garcia, Dr. Tito Guerrero, Bette Smith

From: Mel A. Otero, Jr. MAO

Re: Productivity Training Project Final Report

This is the final report to the partners of the Productivity Training Project. I believe we have accomplished our overriding objective as a demonstration project: to develop a public/private model for delivering workplace skills instruction to small businesses that can be continued as a value adding component of a community's educational mix.

Attachments

Productivity Training Project Final Report

The Productivity Training Project (PTP) began in October of 1994 as a demonstration project of the U.S. Department of Education's National Workplace Literacy Program (NWLP). The PTP has been a partnership between the University of Southern Colorado and the Latino Chamber of Commerce of Pueblo Colorado in the provision of "new economy skills" training to the employees of Latino Chamber member businesses and basic skills training to the unemployed or underemployed population of Pueblo. The following is a final report on the Project's progress in achieving its nine major objectives (PTPOs).

Productivity Training Project Objectives

1) Design and implement an on-going process through the Latino Chamber of Commerce (LCC) for public/private partnerships for workplace literacy training in the city of Pueblo.

Accomplished. From the outset of the partnership of the Latino Chamber of Commerce and the University of Southern Colorado in the PTP, the communication network among LCC member businesses has been essential to the ability of the Project to "sell" its services to the community, although we did not make effective use of this network until our second year of work. Initial questions about the relevancy of University delivered training to small businesses and questions about the quality of service being delivered by a new provider were significant barriers to securing commitments to participate from the LCC membership. Those businesses which supported the PTP idea through the proposal development stage were the first to take advantage of its services and sent the first positive messages through the LCC network. Through the first year, PTP marketing tactics were limited to standard print advertising and a universal message of the value of "new economy skills" training with a heavy reliance on the computer aided instructional method of imparting those skills. As the Project entered its second year, it became evident that

the packaging and advertising methods being used were hindering the progress of the Project toward meeting its qualitative and quantitative goals. We began using those business managers/owners who had already benefitted from the Project as our "sales force," and by relying on their referrals for initial contacts with potential partners, we increased the rate of successful enlistment of Project participants. At the same time, we abandoned the use of the word "curriculum" in our discussions of what the PTP had to offer businesses and focused our questions to potential partners on their business concerns. We discovered that for almost every business we contacted, we could add value by delivering training in the SCANS skills. Although we worked with businesses ranging from home healthcare providers to manufacturers of braking systems for large aircraft, the skills necessary to better address workplace productivity issues have been very much the same. In addition, the Latino Chamber has gone through a maturation of its ability as an organization to broker educational services that meet the needs of its membership. The staff of the LCC has been expanded and encouraged by the Chamber Board to actively canvass the membership about what the workforce in Pueblo needs to improve its productivity. Also, the LCC performs the important function of clarifying with service providers, be they public such as the PTP or private contractors, cost, logistical, and follow-through requirements of service delivery to ensure that its membership receives the high quality it deserves. Over the three-year life of the PTP, we have refined the processes through which partnerships are established and the Latino Chamber of Commerce will maintain the practice of securing for its membership high quality educational services aimed at improving workplace productivity. The success of this process is further evidenced by the PTP's accumulation of $326,000 in in-kind services, and salaried learner time over the three years of the Project. This greatly exceeds our obligated match target of $225,600.

2) Establish a Partners Council to oversee the project and curriculum committees at each company and/or training site.

Accomplished. The nature and number of businesses we have worked with over the past three years have made it difficult to establish committees at each of the training sites. The majority of our training partners have been organizations of fewer than twenty-five employees, and the decision makers with whom we have worked to put programs into place often are owner/manager/line-workers whose time on-the-job is second in importance only to that of the full-time people on the production line. With some of the larger organizations for whom we have delivered training (the largest three employing roughly 900, 300 and 200 people), the PTP has been included in a mix of training initiatives established by the corporate management responsible for maintaining the skills of the workforce. In these cases we have had company committees assisting in the development of training programs. For the most part, we have reported to and received programming guidance from the Corporate Advisory Council of the Latino Chamber of Commerce. This group of representatives from twenty of Pueblo's leading businesses meets quarterly and has served as our Partners Council over the past three years. They provide general oversight and guidance on Project management as well as important feedback on the effectiveness of the Project in meeting the needs of learners. The Partners Council has also been a valuable part of our marketing network through their advertising of the PTP in the numerous civic and professional organizations they represent. Their support has added tremendously to building the credibility of the PTP throughout the community, and their input has helped us ensure that our instructional offerings have been relevant to the needs of the community overall. With the help of the Partners Council, we defined and filled a niche in service delivery that we expect the Latino Chamber to continue to fill as it continues the Productivity Training *Program* after U.S.D.E. funding ends. In addition, a Joint Management Team (JMT) comprised of representatives of our

contracted service delivery partners, Pueblo Community College and Rocky Mountain SER, along with the president of the LCC and the director of the PTP was established and has been functioning as the operational oversight committee of the PTP throughout its three-year run. This group has worked on service delivery issues such as student retention, training site logistics, and equipment and materials efficiency. The open communication and sincere desire to see the PTP succeed on the part of each of these oversight groups has been an asset to the Project.

3) Develop curriculum and acquire curriculum materials for a minimum of 20 job categories.

Accomplished. The real strength of the PTP in meeting the needs of its training partners has been our ability to customize programs of instruction to meet the content and time requirements of a very wide variety of businesses. We have had the good fortune of employing professional training staff whose extensive business experience was constantly called into play as we delivered our classes or workshops. Our staff's thorough understanding of the nature of business environments was key to our ability to make relevant to working adult learners subjects in the SCANS Interpersonal competency area such as "Decision Making Styles" and "Conflict Management." We did not have to stretch much from theory to practice because we have first-hand knowledge of the value of new economy skills to the health of a business and the earning power of individuals. This contextual instructional delivery method was especially useful when our training partners' business issues required instruction in the Resources and Systems competencies. For instance, by analyzing the daily activities of a small construction firm, our trainer was able to diagram the flow of materials against the time requirements for various concurrent jobs and lead the learners into discovering efficiencies that could allow them to do their work more productively and inexpensively. Also, this group of learners had not thought of themselves as a working system

which could better exploit its strengths for higher performance until their working processes were laid out for them in a more formal learning environment. Because of our work histories we know what to look for when gathering materials from the workplace to adjust otherwise standard academic material to reflect the realities of the organization. For instance, memos and letters written by officers, clerks, and the president of a local bank were used to modify an "Effective Workplace Writing" program developed by the Colorado Community College and Occupational System's Educational Partnerships in Colorado for use in strengthening the writing skills of that bank's employees. This is by no means a new approach to workplace education, but for the majority of the small businesses with whom we worked, the high degree of customization we provided was something they thought available only to large organizations whose size dictated that programs be built specifically for them. This preconception was sometimes a significant barrier to our recruiting participants in the program and was overcome primarily through the use of the LCC network to reinforce the Project's credibility with potential partners. As we worked with more and more businesses, our repertoire of course titles became very large, but we consistently built our instruction around the SCANS competencies and foundations.

4) Establish written goals for each company participating in the training, including collecting baseline data for evaluation of Project effectiveness.

Accomplished. The small businesses with which we worked have been mostly entrepreneurial organizations which, because of the deep personal investment of the owners and managers, presented certain barriers to our performing traditional needs assessment types of activities in the process of establishing learning goals. Our small business partners have been generally reluctant to take part in formal assessments. Testing for skill levels was not an option the decision makers

cared to consider, nor were they very receptive to our observing their workplace to ascertain for what areas of their work an educational program would be appropriate. Again, trust in our ability to understand their business concerns was an issue we had to overcome before we could begin building with them a plan to address their educational needs. We found, however, that entrepreneurs will talk about their businesses--a lot. Our interviews with the owner/managers became the bases of our program development, and we adopted a consultative approach to uncovering those workplace issues upon which PTP provided training was likely to have an impact. We also discovered that these interviews were most effective when conducted in pairs, usually a PTP trainer and the Project director, because the interview process usually culminated with the business' decision maker asking what we could do to help his or her organization deal with issues we had been discussing. This sort of on-the-spot program development required that either the trainer or the director draw out information about the business' issues, workforce and past educational experiences while the other interviewer sketched out a plan of instruction to present in answer to the question, "What can you do for me?" This was our "point-of-sale." In most cases, whether or not the organization committed to and followed through with a PTP developed workplace educational program depended upon the answer we gave at that moment. The entrepreneurs running small businesses are used to making decisions quickly and investing themselves or their money in activities that they view as immediately relevant to their business objectives. If we did strike a cord during this initial interview, we were often asked to produce a more formal proposal for building the customized instruction for that business. Usually after one more meeting to discuss the formal proposal, the training would begin. Sometimes at the end of the initial meeting we were told where and when the workforce would be available, and we set dates and geared up to deliver six to twelve hours of instruction. The important learning that came out of this processes for the PTP staff was that the businesses' decision makers needed to be in control of why, how and when their workforce would take part in workplace education. We were

not successful in delivering a standard curriculum presentation for our market to choose from; however, we have been successful in allowing our market to identify their needs and draw from us what value we could impart to their employees. Understandably, we did not hit the mark every time with this process, but we were allowed to follow-up with instruction in areas beyond those outlined in our initial interviews in most situations where we discovered other needs of the organizations for which we provided training. When we gained the trust of the businesses we were in a better position to poll the workforce and mesh the sometimes differing opinions of the decision makers and workers into a more pointed, relevant and useful program of instruction. In all cases where our training has had an impact, the representatives of the businesses with whom we designed the program have been very much involved in ensuring the relevancy of the program to their business needs.

5) Conduct job-task analyses (JTA) for a minimum of 10 job categories at 25 different companies.

We did not meet this objective. The feedback we received from the LCC membership about why JTA was something the Project offered yet they did not choose to take advantage of was fairly consistent. Small businesses indicated that they could not see the value to their organization of taking the time to profile jobs. Although the SKILLS 2000 analysis tool that we had at our disposal greatly compresses the time necessary to perform a full job-task-analysis, we were unable to overcome the perception that the survey and debriefing process would cost the entrepreneurial business an inordinate amount of production time. On the other hand, the larger organizations to whom we advertised this service seemed to be heavily invested in the job profiling and ranking systems they had either created themselves or inherited from corporate human resource offices,

and they were unwilling to challenge what they had already done. Our efforts to perform formal assessments in a diagnostic fashion to use in building educational programs have been discussed above, and we did make an effort to tie JTA using SKILLS to this process; nonetheless, we were unable to establish a close enough relationship to any organization to build the profiles we set out in this objective. It may also be the case that our marketing of this service was somewhat lacking. We spent such a large part of our time in the personal selling of training that we may not have sufficiently explored the subtleties of making the connection between JTA and workplace efficiency. We did have a significant degree of success with the individual skill profiling component of the SKILLS package, however. We guided over sixty people through the process of building a personal skill inventory that they used as the basis for creating an educational plan for themselves, writing a skills-based resume, or choosing a career path more suited to their educational background. A number of people we have taken through this process have entered the university, community college, or new career fields. Though it may be tangential to our original objective, this outcome has been a productive one. The SKILLS 2000 analysis package will remain available to the community via the Latino Chamber of Commerce in its ongoing Productivity Training Program.

6) Provide productivity-related training to a minimum of 600 employees from LCC member employers.

The PTP will be forty-eight people short of accomplishing this objective. The Project has delivered new economy skills instruction to 552 employees of sixty-six LCC member employers. This is inclusive of the customized training and seminars that were delivered in the first year of the Project when staff were still attempting to use the National Workplace Literacy Information

System (NWLIS) to track courses, learners, and contact hours. Most of the NWLIS data that was sent back to us in report format was unusable, so we have relied on our own hardcopy records to track participation from the beginning of year two. From October 1995 through March 1997, we have served a total of 390 employees of thirty-six different Chamber member businesses in 127 separate instructional sessions. These sessions ranged from one to eight hours in length and took place during weekdays, weeknights, and weekends. As discussed above, the needs of these organizations defined much of how our instructional delivery took place. Through our open-enrollment skill improvement workshops for Latino Chamber member businesses, a total of ninety-one people from twenty-six different organizations attended the nine different series we have offered. These workshops were primarily lunch-time, brown-bag events, and over half of the ninety-one attendees participated in more than two of the workshops. Interestingly, there were some small businesses that were unwilling to take part in customized training for their organizations, but they sent employees to every one of our skill improvement workshops. In addition, these workshops served to support our recruitment efforts by giving businesses a sample of what we had to offer before they committed to working with us to build a program of their own. At least half of the organizations for which we built customized programs attended a skill improvement workshop before they invited us to work with their business.

7) Provide workforce literacy training for a minimum of 650 area adults who are unemployed/underemployed as a result of skills shortfalls.

Accomplished. The Project has served 762 individuals and 513 of those have achieved either measurable gains in academic proficiency in at least one module of instruction or other training related goals set out in their IEPs. This objective has been achieved primarily through the efforts

of our contracted training partners at Pueblo Community College and Rocky Mountain SER. Both the Community College and SER will be active participants in the One-Stop Career Center being developed for the Pueblo area. Officials from both organizations have participated actively in planning the One-Stop, and the successful collaboration we have accomplished through the PTP will serve as a model for processes that will be implemented in the One-Stop within the next year. Our pursuit of long-term value for the community in the area of adult basic skills has also led to the PTP having an impact on the shape of state-wide initiatives around adult basic education. The director of the Project was appointed to the State Board of Education's Adult Literacy Commission and the Governor's Business Commission on Adult Basic Learning where work is being done to rectify the State of Colorado's lack of funding support for adult education. The Business Commission created a set of recommendations aimed at solidifying the State's commitment to the preparedness of its workforce through legislated funding of adult education programs and the continuation of the NWLP model of public/private partnership. The Adult Literacy Commission recently had a set of resolutions adopted by the State Board of Education that calls for much more active pursuit of funding sources, collaborative public/private partnerships, and integration of adult education services in Colorado Department of Education priorities. This work is leading toward a convergence of effort that will have significant positive effects on the adult education system in Colorado.

8) Increase productivity in 40 LCC member businesses and confirm the relationship of Project training to productivity gains using measures developed for each organization.

Accomplished. The Project has provided customized training for forty-five different LCC member organizations. The challenging aspect of this objective has been developing measures of

productivity for each of the organizations we worked with. At various times and with various organizations we attempted to build metrics that would be useful in our assessment of training effectiveness. At the same time, we attempted to imbue the measurement tools we were creating with enough practicality to be of long-term use to the organizations for which they were being created. We met with very little success in developing quantitative measurement tools for our training partners. In investigating why this was so difficult, our external evaluation team cited "cultural" reasons as the most likely hindrance to our success in this area. In writing about the broader barriers to delivering workplace education to our target population, the evaluators note that entrepreneurial culture seems to be "one where small business owners have made it on their own and are too proud to seek assistance or perhaps to share what they know about running their business." This reluctance to share information may also have some rooting in the competitive nature of small businesses which requires small businesses to protect whatever edge they have as tightly held proprietary information. Our inability to measure our impact by-the-numbers notwithstanding, we were able to make definite conclusions about the value added by our Project's efforts with the Latino Chamber membership. To confirm the relationship of PTP training to productivity gains, we relied upon the external evaluators' qualitative analysis of our performance. They used an interview process to gather anecdotal information that was used to identify themes that speak to the Project's effectiveness that may be applicable to other, similar workplace training efforts. (Please refer to the *External Evaluation Report*)

9) Produce a comprehensive audit document and develop a final report suitable for dissemination, by September 1997.

Accomplished. This final, expanded PTPO update and the *External Evaluation Report* are the

final pieces of the Productivity Training Project's comprehensive, cumulative documentation of performance. We have produced PTPO updates on a bimonthly basis since January of 1995 which have contained information about program changes, learner contacts, and ongoing assessments of training impact. In addition, the presentation of the PTP model that was included in the April/May 1997 PTPO update was disseminated at the national conference on workplace learning in April 1997. All records of Productivity Training Project activity will be warehoused at the University of Southern Colorado and the Pueblo Latino Chamber of Commerce staff will have access to any information related to the activities of the PTP over these past three years.

Productivity Training Project Report of Training Contacts
Grant Year October 1996 - September 1997
Totals As - Of: September 30, 1997

PTP Office

Businesses Served	Participants
38	202

Individuals Served	Completions
71	71

Rocky Mountain SER

Individuals Served	Completions	IEP Goals Met
140	140	*125

Pueblo Community College

Individuals Served	Completions	IEP Goals Met
119	119	*85

* IEP section may not accurately reflect student goals due to missing data.

Productivity Training Project Report of Training Contacts
Report Period
08/01/97 - 09/30/97

PTP Office

Business	Individuals Served	Dates
Mi Casa de Tranciciones	8	09/05, 09/26

Individuals Served	Completions
32	32

Rocky Mountain SER

Individuals Served	Completions	IEP Goals Met
00	00	*00

Pueblo Community College

Individuals Served	Completions	IEP Goals Met
46	46	* 27

* IEP section may not accurately reflect student goals due to missing data.

Productivity Training Project Report of Training Contacts
Report Period
06/01/97 - 07/31/97

PTP Office

Business	Individuals Served	Dates
BF Goodrich	18	06/17, 07/22
West Plains Energy	15	06/24

Individuals Served	Completions
20	20

Rocky Mountain SER

Individuals Served	Completions	IEP Goals Met
27	27	*12

Pueblo Community College

Individuals Served	Completions	IEP Goals Met
36	36	* 33

* IEP section may not accurately reflect student goals due to missing data.

Productivity Training Project Report of Training Contacts
Report Period
04/01/97 - 05/31/97

PTP Office

Business	Individuals Served	Dates
BF Goodrich	18	04/22, 05/19
Bonfils Blood Center	8	04/18
LCC Board of Directors	14	04/18
Mi Casa De Transiciones	8	04/17, 05/15, 05/29
Trane Company	39	04/29, 05/01, 05/06, 05/08, 05/13, 05/15

Individuals Served	Completions
10	10

Rocky Mountain SER

Individuals Served	Completions	IEP Goals Met
28	28	*18

Pueblo Community College

Individuals Served	Completions	IEP Goals Met
12	37	* 25

* IEP section may not accurately reflect student goals due to missing data.

Productivity Training Project Report of Training Contacts
Report Period
02/01/97 - 03/31/97

PTP Office

Business	Individuals Served	Dates
BF Goodrich	15	02/13, 03/20
Bonfils Blood Center	15	02/14
Central High School	14	02/07
Cortez Construction	04	2/04
Mi Casa De Transiciones	07	03/27
Ruy-Gar	17	03/22
SCA Insurance	13	02/12, 02/19, 03/07
USC Classified Staff	07	02/11
USC Accounting Department	18	03/26
West Plains Energy	15	03/20

Individuals Served	Completions
0	0

Rocky Mountain SER

Individuals Served	Completions	IEP Goals Met
56	46	*46

Pueblo Community College

Individuals Served	Completions	IEP Goals Met
00	0	* 0

* IEP section may not accurately reflect student goals due to missing data.

Productivity Training Project Report of Training Contacts
Report Period
12/01/96 - 01/31/97

PTP Office

Business	Individuals Served	Dates
BF Goodrich	15	12/10, 01/14
Bonfils Blood Center	16	01/03, 01/24
Cortez Construction	05	12/30, 01/23
Kelly Services, Inc.	03	12/05, 12/12, 01/16
USC Classified Staff	09	01/21

Individuals Served	Completions
3	*0

Rocky Mountain SER

Individuals Served	Completions	IEP Goals Met
29	22	**22

Pueblo Community College

Individuals Served	Completions	IEP Goals Met
25	0	** 0

* Three individuals were served in open-enrollment workshops. Workshops will be completed in February. No IEP goals were established for participants in the workshops.
** IEP section may not accurately reflect student goals due to missing data.

Productivity Training Project Report of Training Contacts
Report Period
10/01/96 - 11/30/96

PTP Office

Business	Individuals Served	Dates
BF Goodrich	17	11/05, 11/19
Bonfils Blood Center	12	10/04, 11/01, 11/26
Kelly Services, Inc.	3	11/07, 11/14, 11/21
Latino Chamber Board	11	11/08
Minnequa Bank	6	10/10, 10/15, 10/17, 10/22
SCA Insurance	10	10/31, 11/07, 11/15
USC Classified Staff	11	10/31, 11/19

Individuals Served	Completions
6	*6

Rocky Mountain SER

Individuals Served	Completions	IEP Goals Met
29	18	**18

Pueblo Community College

Individuals Served	Completions	IEP Goals Met
0	0	** 0

* Six individuals were served in open-enrollment workshops. No IEP goals were established for participants in the workshops.
** IEP section may not accurately reflect student goals due to missing data.

External Evaluation Report

Productivity Training Project

Year Three: October 1, 1996 - September 30, 1997

Evaluators: Elizabeth Amidon Smith
Mary Crabbe Gershwin

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Overview of External Evaluation Process and Methods

The relationship between the Productivity Training Project (PTP) and the External Evaluation Team (consisting of Mary Crabbe Gershwin and Elizabeth Amidon Smith) has been an ongoing one characterized by collaboration.

The evaluation team was contracted originally in 1996 to conduct the second-year evaluation of the project and re-contracted to conduct the final evaluation of the three-year project in February 1997. Whereas one of the primary goals of the second-year evaluation was to help move the project into a successful third year under grant funding by consulting on strategic planning, the primary goals of the third-year evaluation are to assist the PTP in gauging its effectiveness as a workplace education program and to "provide guidance on what elements of the Project hold the most potential to be significant contributions to the learnings of NWLP demonstration grants" (PTP Objectives Update May 1997). These evaluative goals were defined in large part by the administration of the PTP.

The evaluation team worked closely with the PTP to fulfill these objectives. Following what was mutually agreed upon as the success of the evaluative process of the previous year, the PTP and the evaluation team pursued a highly qualitative, collaborative and participative model for the evaluation. Qualitative methods employed by the team included interviews, document review and participation. The team made two site visits to Pueblo (in April and July 1997) for a total of three days to accomplish the following:

⇒Conduct 17 interviews with a representation of key stakeholders:

- PTP Project Director
- Latino Chamber of Commerce (LCC) Staff
- PTP Instructional Team
- University of Southern Colorado (USC) Dean
- Students
- Business Owners/Management

⇒Coach and critique presentation "Delivering New Economy Skills Training to Small Businesses" for the National Workplace Learning Conference in Milwaukee, WI

⇒Collect and gather information for the External Evaluation Report

⇒Review and reflect upon program progress which included presenting a draft of this External Evaluation Report to personnel of the PTP for feedback and input.

Documents reviewed for this report included: PTP Objectives Update Reports to the USDE, Presentation Materials, letters and testimonials from businesses participating in the project, Proposal for collaboration and continuation of the PTP under the auspices of the USC Hasan School of Business. The evaluation team also attended the National Workplace Literacy Conference in Milwaukee, WI in April 1997 on behalf of the Productivity Training Project.

What this report represents are stakeholders' perspectives of their experiences and of the effectiveness of the Productivity Training Project. In providing an analysis of these perspectives, the evaluators hope to present an understanding of this program by discussing themes that emerged from the data reviewed and by providing the stakeholders with information that may be useful in moving forward with this educational program in their community.

Emergent Themes on the PTP's Effectiveness

Interviews were conducted with 17 stakeholders. Several of these stakeholders held multiple roles, e.g. student and business owner *or* partner of the PTP and business owner. The interviews were open-ended with no standard (and the evaluators would argue limiting) interview protocol followed. The desire was to let themes emerge from the comments of the stakeholders on their perception of the project and their participation in it. Interviews started with an overall explanation of the purpose of the evaluation and an opening question such as "Please tell us about your involvement with the PTP" and the conversation would go from there. Time was the most obvious constraint on the process although the relationship with the evaluators was also a constraint on the comments and nature of the conversations entered into with each stakeholder.

The analysis of the interviews with stakeholders as well as the document review revealed seven emergent themes which all speak to the effectiveness of this workplace learning project and perhaps to concepts about workplace projects that may be applicable to other programs:

1) Community and Cultural Context
2) Business/Education Needs
3) Barriers to Providing Workplace Education
4) Instructor Expertise
5) Impact of Workplace Education
6) Marketing of the PTP
7) Past/Future of the PTP

There is significant overlap in these seven thematic categories and we have chosen to group them as follows:

Workplace Education in the Community: Community and Cultural Context, Business/Education Needs, Barriers to Providing Workplace Education

Program Strengths: Instructor Expertise and Impact of Training

Program Challenges: Marketing the PTP and Past/Future of the PTP

Workplace Education in the Community

At our follow-up visit and last evaluative visit for the second year of the grant, the group (evaluators, director, program assistant, instructors) discussed the nature of the community in which this project is situated. The question that everyone agreed would be worth looking at was "What is it in this community that would make a program successful?"

The issue of community (and context of a program) was evident in the presentation that was developed for the National Workplace Conference as well as in many comments made in the interviews. Representatives of the Latino Chamber of Commerce (LCC) particularly stressed the characteristics of a community whose members want "to belong to something". Time was spent giving us information on the historical context of the economy in Pueblo. Those interviewed also wanted us to understand why education is so important in the community and what educational initiatives the LCC is promoting and supporting.

It may have been valuable at the outset of this program to really work with the community to see what it wanted and needed in the realm of workplace education. One of the original partners said, "I thought when it started that everyone would beat down the doors", and this assumption that workplace education was something the community was waiting for was one that might have been examined at the outset. At the end of this project, the focus on community has led to a market study of the community's (and surrounding communities) business needs in order to assess workplace education's place and potential future.

This question of the needs of the community and the needs of the businesses who participated was apparent in the interview comments -- the majority of the interview comments were made on this topic and on the impact of the program. Business owners, managers and LCC representatives mentioned that companies don't know what their needs are and that a very important role the PTP played was to help them identify needs and then create educational programs that would address

those needs. Students needs were mentioned as well -- "the individual is the asset" (manager comment), "Where is learning/human development?" (LCC staff questions), and one student commented, "I believe in the training and development of office staff". The tone of most of the conversations and the marketing materials of the PTP, however, stressed the needs of the businesses over the needs of individual students participating in these programs. Are the employees' needs subsumed by the business needs? The voice of student needs was not really heard. Overall the comments were very positive about the PTP's abilities and sensitivity in recognizing and meeting the needs of the businesses; the presentation materials prepared on the PTP for the National Workplace Conference also presented this as one of the most significant skills in working with small businesses in particular.

Barriers to providing workplace education were primarily three: time, money and culture. The cultural aspect was described as one where small business owners have made it on their own and are too proud to seek assistance or perhaps to share what they know about running their business. Time and money were cited by most of the business owners and managers interviewed as major constraints on their ability to provide educational opportunities for employees. This needs to be recognized for the barrier it is for future programs -- the PTP was offering "free" services, the "cost" to businesses was release time for employees.

Program Strengths

The PTP in its three years had served 501 employees by June 1997; this speaks to the "success" of this project -- moving from serving 2 business partners in their first year to 10 their second year to 61 by June of the third year. From the responses of interviewees and others involved with the PTP this is related to at least two major program strengths: the expertise and skill of instructional staff as well as the benefits/results/impact of workplace education felt in the businesses who took part.

As one person put it, "In this community, they buy the person". Instructor expertise was particularly critical to the success of the PTP and was valued and recognized by participants:

Instructor was flexible to address issues...as they arose

[The instructor's] real good as far as relating (with a diverse group)

Enjoyed [the instructor] -- great sense of humor

I am convinced that [the instructor] is the finest TQM trainer -- has the ability to bring it down to the level of staff...brought a lot of value to [the] PTP

We attended several [brown bag lunches] and we were impressed with [the instructor]

[The instructor's] been a professional resource for our company

[The instructor] would always ask the audience how something might help, anyone have problems in this area?

I've gone to a lot of seminars and [the instructor's] good at grabbing your attention

[The instructor] adapted so well; [the instructor] always included himself

As mentioned earlier, there were a large number of comments pertaining to the impact of educational programs. At the end of the second year of the project, the director was particularly concerned about measurement of program effectiveness (especially Level IV evaluation). Within the recommendations from last year's evaluation report, it was suggested that the PTP *focus on a sample of the business partners they've worked with and evaluate success using measures that make sense to the business partner*. It was also noted that *anecdotal information from supervisors and employees to evaluate program success...is a valid source of evaluation information*. One upper management participant who said he works in a measurable business said that, "We have truly improved...I'm not going to give PTP all the credit, but we've really improved". The means of measuring the success of a program or its organizational impact needs to make sense to the company or organization involved; the companies interviewed seemed to rely upon and prefer anecdotal feedback from staff on program success as opposed to numerical measures.

The responses of the interviewees would overwhelmingly indicate that this project in their perception had impact -- whether on an individual level ("I saw that I could receive personal benefit") or organizational level ("It facilitated change" "PTP prepared us to be successful and be prepared for change").

Program Challenges

Was the PTP marketed sufficiently in the community? Did business know about the opportunity available to it? (These questions were raised in the interviews). It seems that the PTP with its difficult start (numerous personnel transitions) and its partnership with the Latino Chamber and USC and the "turf battle" with Pueblo Community College had difficulty establishing a recognized and marketable identity. However, considering that the PTP surpassed its goal of providing workplace education to 40 members of the LCC by 50%, maybe the ability of this project to succeed despite the hurdles it faced speaks to its marketing ability. Participating businesses attested to this in the interviews -- ""When they started the PTP, we were immediately contacted, and I was very impressed" "LCC sent a mailer, got my attention...got a follow-up call". The brown bag seminars were also credited as a strong marketing tool; they showcased the project to LCC members.

The PTP has worked hard to establish relationships and collaborations in order to transition as a grant-funded workplace education project to a community-based, self-supporting entity. The relationship with the LCC blossomed in the third year of the project. In part the housing of the project at the chamber's office building and increased exposure to businesses as well as the strong support and advocacy of the Board's chairman contributed to the strength of this relationship. The project director also worked particularly hard at establishing a link with the USC Hasan School of Business -- a discussion paper was presented in summer 1996, a proposal presented in January 1997, and ongoing discussions and training offered to the department. The project should be commended on the efforts it has made to link with other entities in the community and to explore avenues of support, resource-sharing and future funding. It was clear in the discussion with the business school dean, however, that although verbal support of the project was strong, without the PTP being self-supporting financially, the school of business could offer little

material support other than office space. The LCC expressed interest and concern in "finding a way" to continue the project after the grant.

The missing piece that is telling for workplace education projects is the commitment from the businesses where these programs operate. The interest and support from the business community is what would sustain such a project. None of the owners or managers really commented on the future of the project, the partners in the PTP did. As one of the Latino Chamber representatives stated, "To me the PTP is a great benefit to the community, but we have to educate the community".

Closing Remarks

These remarks are written after the last evaluator visit to Pueblo where the draft of this report was presented to the director, program assistant and one of the instructors. The focus of the visit was to explain the methods used to develop this report, to present the analysis of the data and to reflect upon what meaning and understanding of the PTP has been constructed and how that fits with their experiences of this project. This visit was also an opportunity to discuss the plans for the future of the PTP.

The director was comfortable with the qualitative focus of the report and said it was consistent with what the original proposal for evaluation had promised to provide. Our discussion for the most part initially focused around the "community piece", which the group agreed was "really important" to this project from its inception. It was mentioned that even in the context of writing the grant, the theme of "inclusion" was evident and was a unifying theme for this project throughout its years of activity. The hope was for this grant to help the community by being a community resource and to provide community members (under-employed, unemployed, chamber members and the University) with opportunities for involvement in education. As the director expressed, "My own personal agenda is to better everyone who participates".

Much of the remaining discussion centered around what legacies were a part of the project and the hope that the project will remain a community resource. "Where will the computers go?

Where will they best suit the community?" Among the legacies of the PTP: the project has given the Latino Chamber of Commerce "credibility as a player" in educational programs (a major thrust of the LCC's mission for this year and coming years); the PTP has given the community a "benchmark" for quality educational instruction; and, hopefully, the PTP has on some level facilitated a change in individuals' and businesses' perspectives about education being an on-going pursuit. The director also saw his participation in the Governor's Commission on Adult Literacy as a significant contribution of the PTP in engaging the community in literacy issues on a statewide level.

As the project is finishing up its activities under grant auspices, its director and staff are working to create a "bridge" for future activity. Two workshops are planned for the last two months of the project: a customer service seminar and a "leadership skills for women in business" series. The group is working to transition the *Productivity Training Project* to the *Productivity Training Program* under the Small Business Advisory Committee of the LCC. The LCC could continue to broker the services of the project to their business members and members would be expected to pay for the services provided. The instructors who have such credibility in the community could be hired to come in and deliver training. The concerns of the director are the marketing of the program which was a main part of his job and the quality and consistency of delivery which were hallmarks of the PTP. Linkages that would support membership of the LCC are being explored with the Small Business Development Committee (SBDC) at Pueblo Community College as well as with the Small Business Institute at USC.

Most significantly, the people who worked hard on this project in providing service to their community will continue to be advocates for adult workplace education in Pueblo. The expertise they brought to and gained from participation in the workplace grant will be felt in the community wherever they take their talents. As the director concluded, "Each of us who's been a productive piece of this is a member of the LCC and [is] active in the community in other contexts".

Finally, the director requested that this report include reflection on how the PTP fits into the national movement of workplace learning. This evaluation team has worked with some twenty projects across the United States over the past three years, and given that national perspective, it appears that the PTP is unique in its success in reaching very small businesses (with less than 25 employees). This small business sector has a great need for basic education for employees, but lacks both the resources to develop opportunities and training models that are appropriate for the demands in small business settings. Few workplace learning projects have successfully served small business. The PTP project has stepped into this gap by developing a practical model which weaves individual employee skill development together with small business management and planning. PTP's model of combining training with the process of solving problems in small businesses presents a new solution to training the work force in small businesses. This solution demonstrates that training need not be an "add-on" or an extra that small business cannot afford in the rush of daily demands. Rather, it shows that learning can be a critical dimension to improving the process of operating a small business. This model was developed with federal funding for the cost of delivering training. It remains to be seen whether small businesses would fund this cost without external support.